Traveler Instructions to Create a Group Authorization In DTS

A Step-by-Step Guide

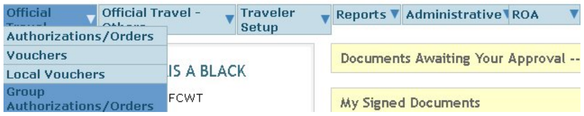
DTS Version 1.6.4.3 August 16, 2005

(See ***Chapter 3*** in *Document Processing Manual*)

Logging into DTS with a Common Access Card (CAC)

a. Insert your CAC into reader.
b. Using Internet Explorer, go to the website portal http://www.defensetravel.osd.mil
c. Click the ***Log In*** button, read and select ***Yes*** at the *Security Alert* screen.
d. Read and ***Accept*** the *DoD Privacy and Ethics Policy*.
e. When the digital signature window opens, the *Key File* will appear.
f. Enter your CAC *PIN* then click ***OK***.
g. *First time* users will be taken to the *User Activation* screen. Enter your SSN in both fields and click ***Submit***. You will be taken to a new *User Activation* screen. Click the ***Self Registration*** button, Complete all *Required Information* (noted by a red asterisk (*)) in the *Recommended Information* and *Preference Information* tabs in the navigation bar. After completion, click the ***Self-Registration Submit*** link. You must log off of DTS. You will be notified via email when the registration has been accepted. Once accepted, you may log into (and use) DTS.

Creating a Group Authorization


Official Travel
Official Travel - Others
Traveler Setup
Reports
Administrative
ROA
Authorizations/Orders
Vouchers
Local Vouchers
Group Authorizations/Orders
IS A BLACK
FCWT
Documents Awaiting Your Approval --
My Signed Documents

a. On the DTS Private Page, mouse over to *Official Travel* on the navigation bar.
b. Click ***Group Authorization/Orders*** from the menu selection.
c. Select the ***Create a New Group Authorization/Order*** then click ***OK*** at the *Creating Group Authorization* window.

NOTE: If you are a first time user you will be prompted to review/update your profile. Make any adjustments then click the ***Update Personal Information*** button and the ***OK*** button in *Profile Information is being Updated…* window.

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Group Travel Selection/ Selected Travelers

a. Select the link ***View All Available Travelers*** to see every traveler in the group to which you have access; or search for a specific traveler by entering the last name in the field provided and click ***Search***.

b. Select the desired travelers from the available list by placing a check in the corresponding traveler(s) checkbox.
c. Once the appropriated travelers have been selected, click ***Save Selected Travelers to Group***. The *Selected Travelers* table will show the list of travelers included in the *Group Travel* document.
d. From the drop-down menu, select the appropriate routing list for the current travel document. Only the routing lists available to the *Primary Traveler* will be shown. The routing list defines who will review and approve the document.
e. The *Select Travelers* table will show the list of known travelers by name and the last four numbers of their Social Security Numbers. To remove a traveler from the list, select the ***Remove*** link. To select the *Primary Traveler*, click the radio button next to the corresponding traveler. Five asterisks mark the current *Primary Traveler*.
f. If the number of travelers on the document is known, but not the specific individuals, enter the total number of travelers in the *Total Traveler(s)* field.
g. Click ***Proceed to Trip Overview***. *Unknown Traveler(s)* field will now be populated.
Note: Document cannot be approved until all costs are properly allocated and/or until all unknown travelers are identified.

NOTE: If any travelers listed on the group authorization are first time users, you will be prompted to review/update his/her profile. Make any adjustments then click the ***Update Personal Information*** button and the ***OK*** button in *Profile Information is being Updated…* window.

Trip Overview

Itinerary
Travel
Expenses
Accounting
Additional Options
Review/Sign
Trip Overview
Per Diem Locations

a. Enter the *Overall Starting Point* by selecting the starting location from box on left or by typing a location in the field.
b. Enter the arrival date for the TDY*/TAD location* in the *Start Date* field.
c. Enter the *Overall Ending Point* by selecting locations from the drop-down list on the left or by typing a location in the field.
d. Enter the *Return Date* for the *TDY/TAD location* in the *End Date* field
e. Select *Trip Type* and *Trip Purpose* by using the drop-down menus.
f. Select ***Proceed to Per Diem Locations*** and click ***OK*** at the popup window.

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Per Diem Locations

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Accounting
Additional Options
Review/Sign
Trip Overview
Per Diem Locations

a. Click ***Search Location***.
b. Enter the name of a city in the *Search Term:* box to find a per diem location.
c. Select the radio button next to the desired location and then click ***Select and Close***.
d. Click ***Save This Location*** then ***OK*** at the popup window.
e. Scroll to the bottom of the page and click ***Continue***.

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Ticketed Transportation

Itinerary
Travel
Expenses
Accounting
Additional Options
Review/Sign
Ticketed Transportation

a. Enter ticket information in the boxes on the left of the screen estimating the cost for ***ALL travelers***. Be sure that each box marked with a red star is completed (required information).

b. When you have entered all the information and have reviewed it for accuracy and completion, click ***Save*** to record the information in the travel itinerary. The *Ticket Transportation Saved* screen will appear.
c. To view your *Ticketed Transportation* information, or to change your expense information, select the ***View/Edit Expense Details*** link near the bottom in the *Ticket Information* section.

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Expenses

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Expenses
Accounting
Additional Options
Review/Sign
Non-Mileage
Mileage

a. Click ***Expenses*** from the top navigation bar. The Non-Mileage Expense screen appears.
b. Select the *Expense Type* from the drop-down list, or if unlisted, enter it in the *OR* field provided.
c. Type the estimated *Cost* of the expense. Remember, expense estimates will include all travelers.
d. Enter or select the projected *Date* the expense will be incurred.
e. Select the *Method of Reimbursement* for the expense incurred from the drop-down menu.
f. Enter up to five expenses on this screen and select ***Save Expenses*** at bottom of the screen.
g. The *Expenses Summary* table on the right side of the screen lists expenses by *Type*, *Date*, and *Cost*. Select ***Edit*** or ***Remove*** to change or erase any incorrect information.

h. Clicking ***Edit*** brings up *Edit Expense*. Click the ***View/Edit Expense Details*** link in the lower left to use the *Foreign Currency Calculator* for the expense. Click ***Save Change*** or ***Return***.
i. Select ***Mileage*** from the sub navigation bar and enter any expected mileage expenses for *Private Vehicle* travel.
j. Click the ***Save Expense*** button.

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Lines of Accounting

Itinerary
Travel
Expenses
Accounting
Additional Options
Review/Sign
Accounting Codes

a. Click ***Accounting*** from the top navigation bar or select ***Continue*** on the bottom of page.
b. From the drop-down menu, click the ***Accounting Label*** with which the current trip is associated.
**If multiple lines of accounting are necessary, select them one at a time, an *Allocate Expenses* button will appear.
  1) Click the drop-down menu next to ***How to Allocate*** and distribute the expenses **By** *Expense Category*, *Date*, *Percent*, or *Dollar Amount*.
  2) Click the ***Allocate Expenses*** button.
  3) Enter the appropriate allocation information then click ***Save Allocations***.
c. Select ***Additional Options*** from the top navigation bar.

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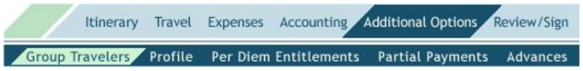
Additional Options


Itinerary
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Expenses
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Group Travelers
Profile
Per Diem Entitlements
Partial Payments
Advances

a. *Group Travelers*– Add/delete travelers from group document, identify any unknown travelers, and change primary traveler /routing list.
b. *Profile***-** Modify or add personal information
c. *Per Diem Entitlements* – Adjust entitlements.
d. *SPPs* – Schedule Partial Payments if over 45 days.
e. *Advances* – After approval, individuals must amend their document to request an advance.
f. After entering any *Additional Options*, select the ***Continue*** button at bottom of page.

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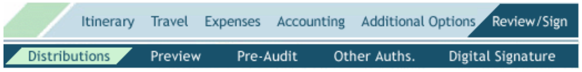
Review / Sign


Itinerary
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Review/Sign
Distributions
Preview
Pre-Audit
Other Auths.
Digital Signature

a. Select ***Distributions*** from the *Review/Sign* navigation bar.
b. In the *Expense Summary* section click the ***Edit*** link next to the item to distribute.
c. Select the distribution method from the drop-down menu (*Equal*, *Amount*, *Percent*, *Single Traveler*).
d. If the item will be distributed equally, check the box next to *Distribute to All Travelers*. If not, enter the appropriate figure for each user next to his/her name.
e. Click the ***Save Distribution*** button.
f. Continue to Edit and Save each expense until all expenses are distributed properly. To see all distributions click the radio button ***Yes*** for *Include Distribution*?.
g. Select ***Preview*** from the navigation bar to review the *Itinerary*, *Reservations*, *Expenses*, and *LOAs* for accuracy, and to add any comments where necessary to the AO and CTO. Click on the ***Save and Proceed to Pre-Audit*** button.
h. In the *Pre-Audit* screen, enter justifications in the comment boxes. *Justifications* are *mandatory*. Click ***Save and Proceed to Digital Signature***.
i. (Optional) – Select ***Other Auths.*** in the sub-navigation bar. Click ***Add Additional Authorizations for this trip*** link to select from a master list of all other authorizations.
j. If not, select ***Digital Signature*** from the sub-navigation bar. Click the ***Submit Completed Document*** button.
k. Stamp the Document ***Signed.***
l. Enter your *PIN* in the *Digital Signature Login* box.